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U.S. Department of  
**EDUCATION**

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## *Session 37*

# *Getting the Most Out of EDExpress 8*

and

# *What's New In EDExpress 9*

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# *Introduction*

- Presenter information
- For whom is this session intended?
  - Medium and advanced users
  - Hands-on/practical for EDExpress 8

# Agenda



- What's new in EDEExpress Version 9 (2003-2004)
- Queries
- Defining user databases
- Formatting custom export files
- Evaluations
- Questions





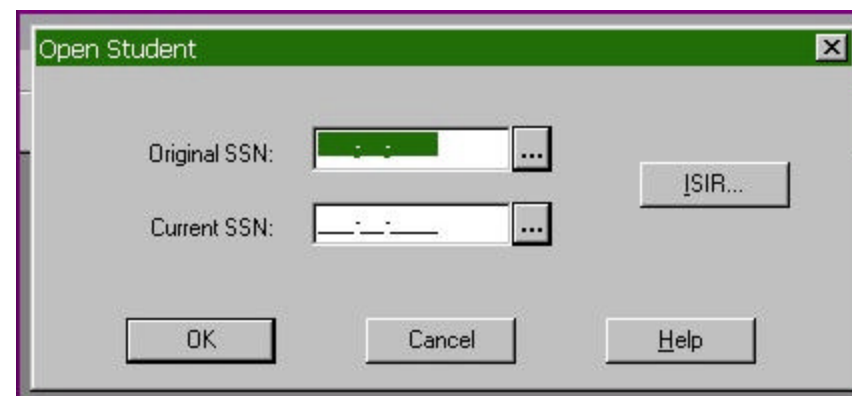
# *What's New in EDExpress 9*



Highlights of changes to  
the Global, Apps, and  
Packaging Modules in  
EDExpress for 2003-2004

## *New for Global*

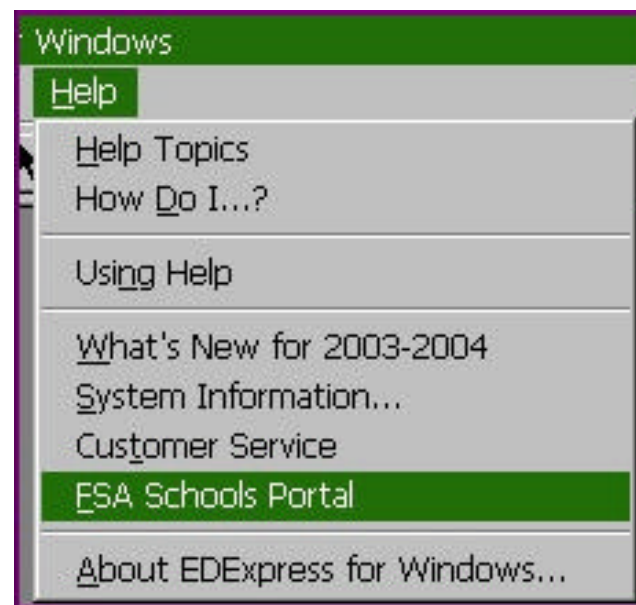
- You can open records using either the student's original SSN or current SSN.
- If multiple students share the same SSN, EDExpress will display a demographic database grid listing the students.



The screenshot shows a Windows-style dialog box titled "Open Student". It contains two input fields: "Original SSN:" and "Current SSN:". Each field has a text box with a green highlight and a button with three dots to its right. To the right of these fields is a button labeled "ISIR...". At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

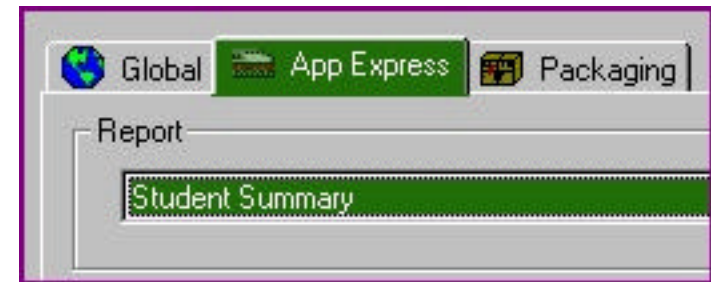
## *New Menu Items*

- A link to FAA Access Online has been added to the View menu.
- A link to the FSA Schools Portal has been added to the Help menu.



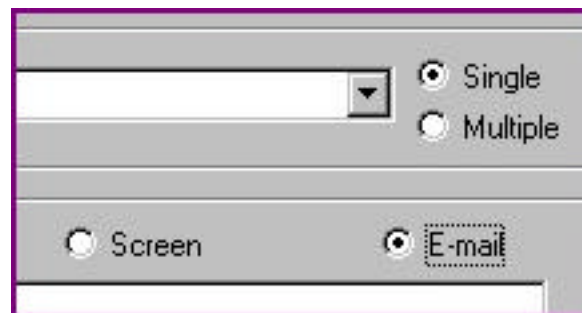
## *Student Summary*

- A new report has been added to the software. The student summary report is available from the Print dialog box whether a student's record is open or closed. The report includes basic award/COD information.



## *Print to E-mail*

- Print to e-mail functionality has been added to the software. This will allow you to e-mail student-based letters as HTML attachments.
- The student's e-mail address is now displayed on the ISIR Review, Loan, Awards, Pell and Verification Worksheet tabs.

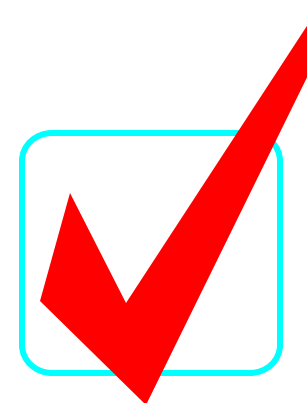


A screenshot of a software interface with a grey background. At the top, there is a dropdown menu with a downward arrow. To the right of the dropdown are two radio buttons: 'Single' (selected) and 'Multiple'. Below these is a horizontal separator line. Under the separator, there are two more radio buttons: 'Screen' and 'E-mail' (selected). The 'E-mail' button is enclosed in a dashed rectangular box. At the bottom of the interface is a white text input field.



## *New for Apps*

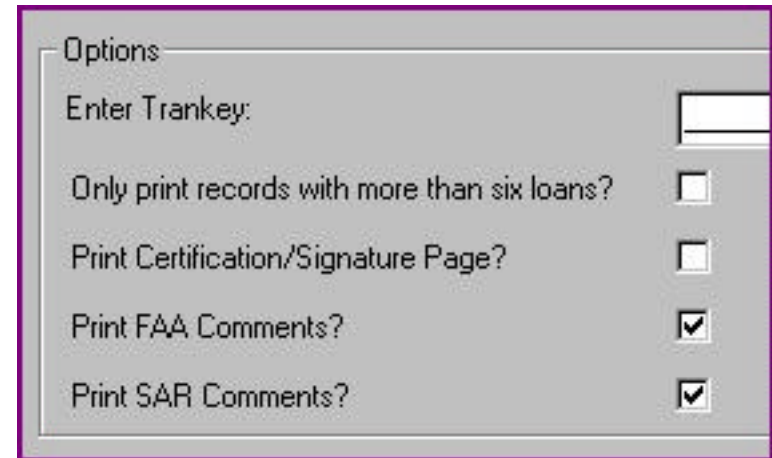
- A Verification Tracking Flag can be viewed on the FAA Information screen from a student's record and in the FAA Information section of the printed ISIR. You can query on the flag and print lists based on it.



Early Analysis Flag	
Rejects Met:	19
Verification Tracking Flag	1
Dependency Override	
Duplicate Request	
Correction # Applied To	
Application Receipt Date	02/15/2003
Input Record Type	

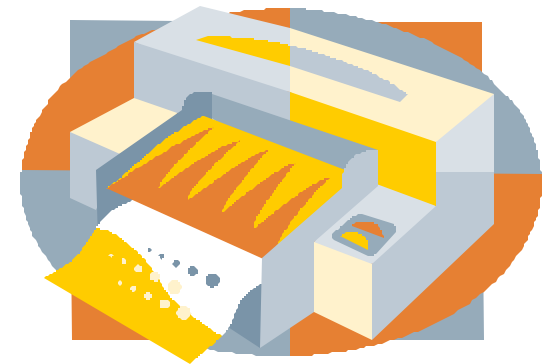
## *ISIR Printing*

- A checkbox has been added to the Print (ISIR) dialog to print only records with more than six loans.
- The “Print FAA Comments?,” “Print SAR Comments?,” and “Print Loan Information?” checkboxes on the Print (ISIR) dialog are checked by default.



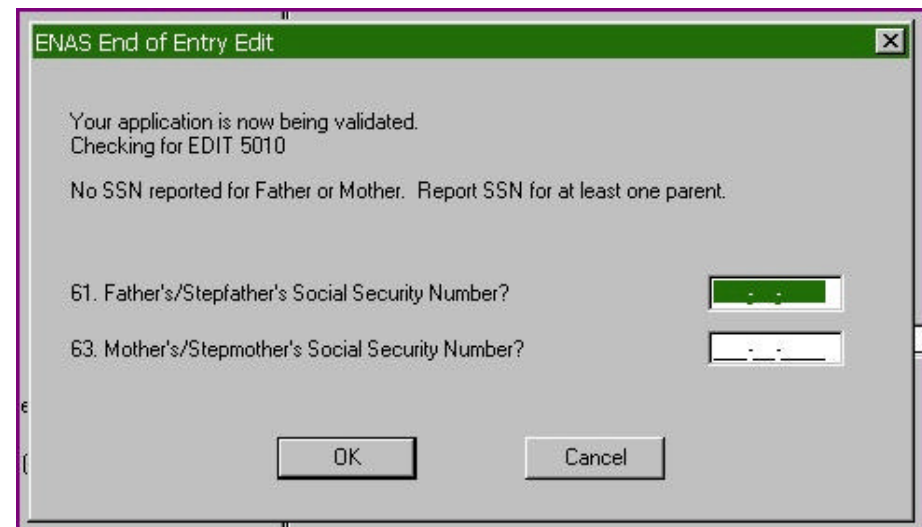
A screenshot of a software dialog box titled "Options". It contains a text input field labeled "Enter Trankey:" followed by five checkboxes. The checkboxes for "Print FAA Comments?" and "Print SAR Comments?" are checked, while the others are unchecked.

Option	Checked
Enter Trankey:	
Only print records with more than six loans?	<input type="checkbox"/>
Print Certification/Signature Page?	<input type="checkbox"/>
Print FAA Comments?	<input checked="" type="checkbox"/>
Print SAR Comments?	<input checked="" type="checkbox"/>



## *Parents' SSNs*

- A new End of Entry Edit has been added to require dependent students to enter at least one parent's SSN.



ENAS End of Entry Edit

Your application is now being validated.  
Checking for EDIT 5010

No SSN reported for Father or Mother. Report SSN for at least one parent.

61. Father's/Stepfather's Social Security Number?

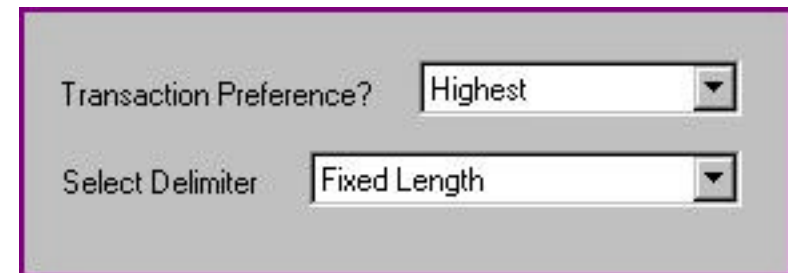
63. Mother's/Stepmother's Social Security Number?

OK Cancel



## *Export External ISIRs*

- A transaction preference filter has been added to the Export dialog box for external ISIRs with “All,” “Highest,” and “Active” as export options.



Transaction Preference? Highest ▼

Select Delimiter Fixed Length ▼



# *Getting the Most Out of EDExpress 8*

## *Hands On*



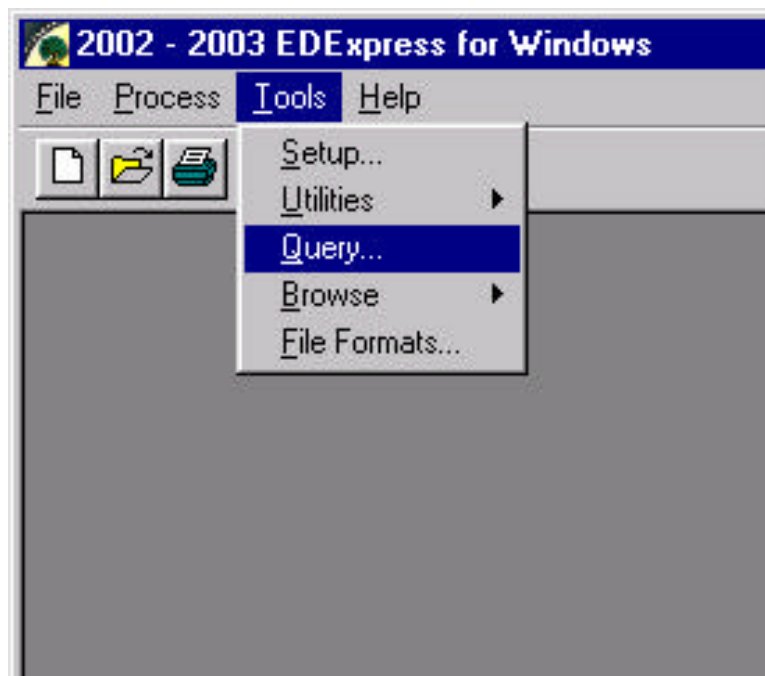
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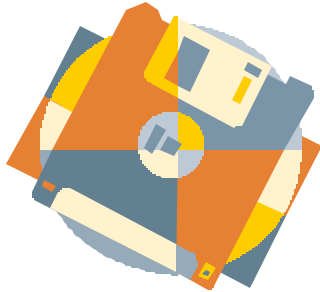
Session 3714

# *What is a Query?*



- A set of criteria that describes a particular student population.
- Allows you to search your database for specific kinds of data.





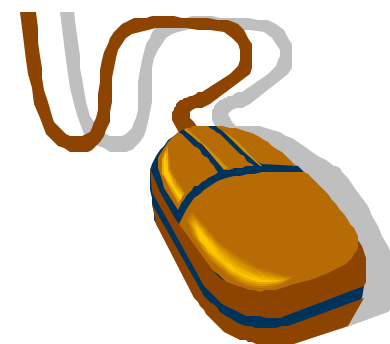
# *Types of Queries*

- Predefined queries
  - Commonly used
  - Templates for your own queries
- Parameter queries
  - Fixed fields but not fixed values
  - Prompt at execution

## *Rules for Queries*

- Left to right, beginning to end, AND / OR.
- Parentheses change order of execution.
- Both segments must be true when connected by AND statements.
- At least one segment must be true when connected by OR statements.

# Using Online Help



Lots of online help available in EDEExpress

# *Predefined Query Demo*

- Log in to EDEExpress
- Tools | Query | App Express
- Click on Retrieve to view other predefined queries
- File | Print | App Express tab | List - Processed ISIRs
- Selection Criteria | ellipsis on Query Title





# *Parameter Queries*

- Tools | Query | App Express
- Add | create DOB RANGE query
- Print using the query you just created
  - File | Print | App Express
  - ISIR and Multiple
  - Selection Criteria / find your query



## *More About Queries*

- Existing queries can be renamed and edited to create new queries.
- Complex queries can be created using parentheses to group criteria.
- Parameter queries containing text strings should use LIKE as the operator.



## *Field to Field Comparisons*

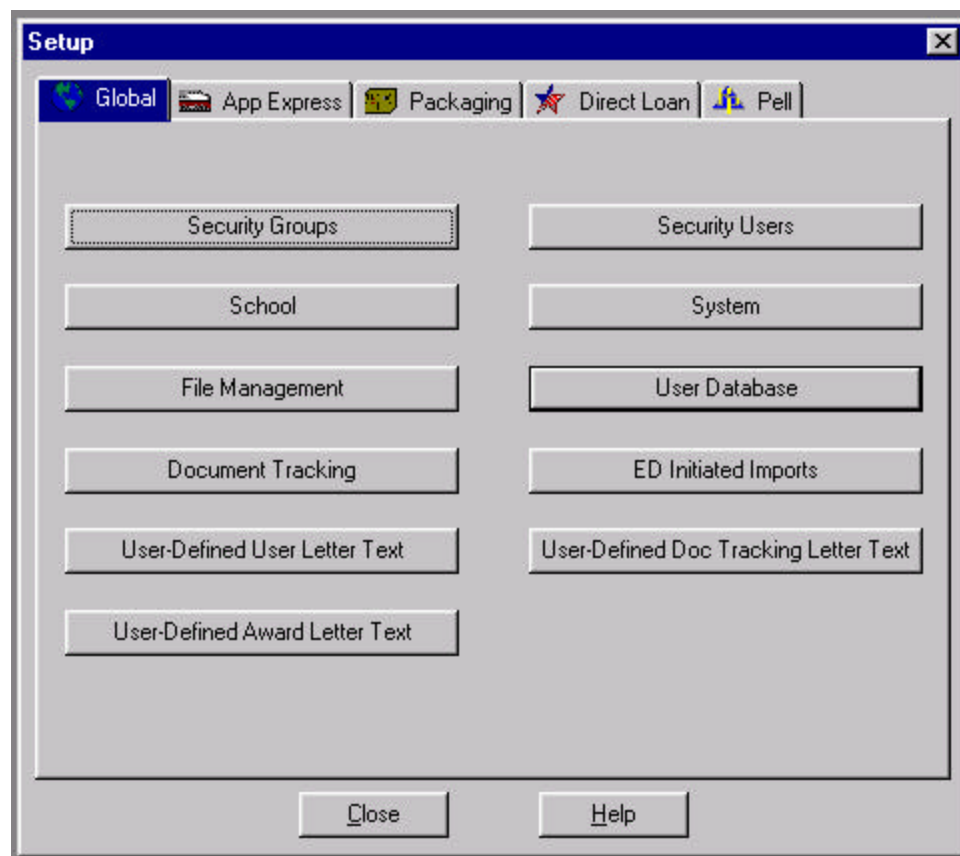
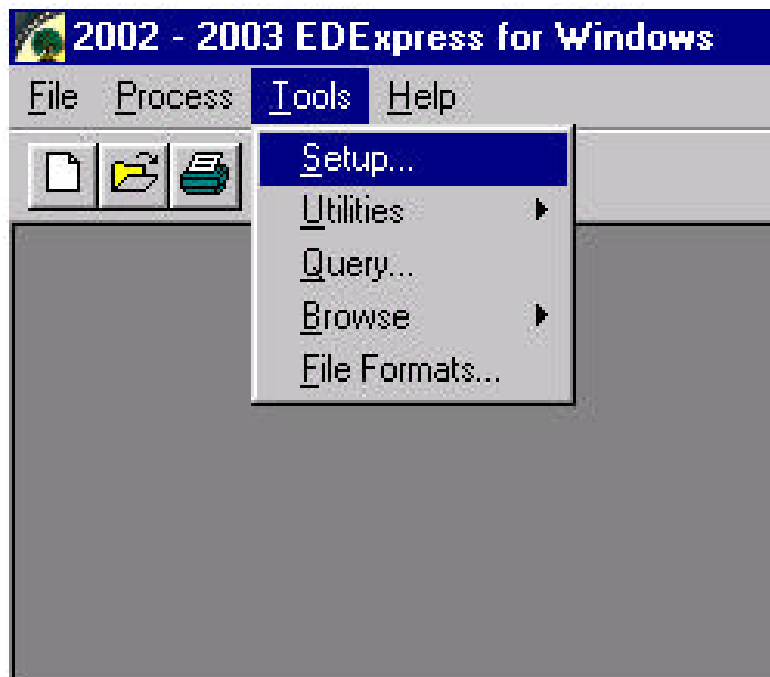
- Compares numeric data in a single transaction instead of filtering the entire database
- Example: parents' taxes paid > 40% of their AGI

# *User Databases*

- A supplement to the existing, hard-coded EDExpress database.
- You decide what to put into the user database.



# Creating User Databases





## *User Database Demo*

- Tools | Setup | Global tab | User Database; click OK.
- Field = HSGPA (does not allow spaces).
- TYPE field: choose NUMERIC.
- Fill in DESCRIPTION with “High School GPA.”
- Click OK, Yes, Close

## *Entering User Data*

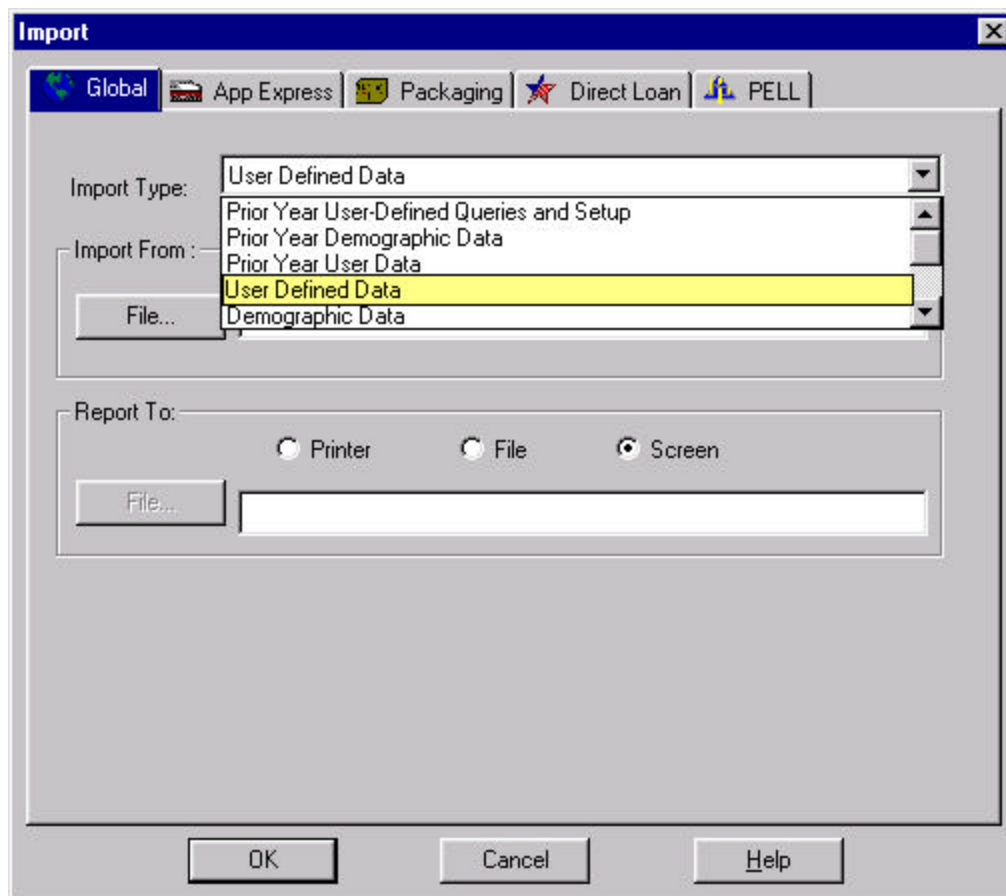
- PROCESS | MULTIPLE ENTRY | GLOBAL
- Check USER FIELD and USER VALUE
- Select student
- Update USER FIELD and USER VALUE
- Save
- Check student record USER DATA tab



## *Importing User Data*

- You can also import that data into EDEExpress from a text file.
- The record layout is found under FILE | PRINT | GLOBAL tab | RL - Import User Data.

## *Import the User Data*



- FILE | IMPORT
- GLOBAL tab
- User Defined Data
- Find the file and import it.



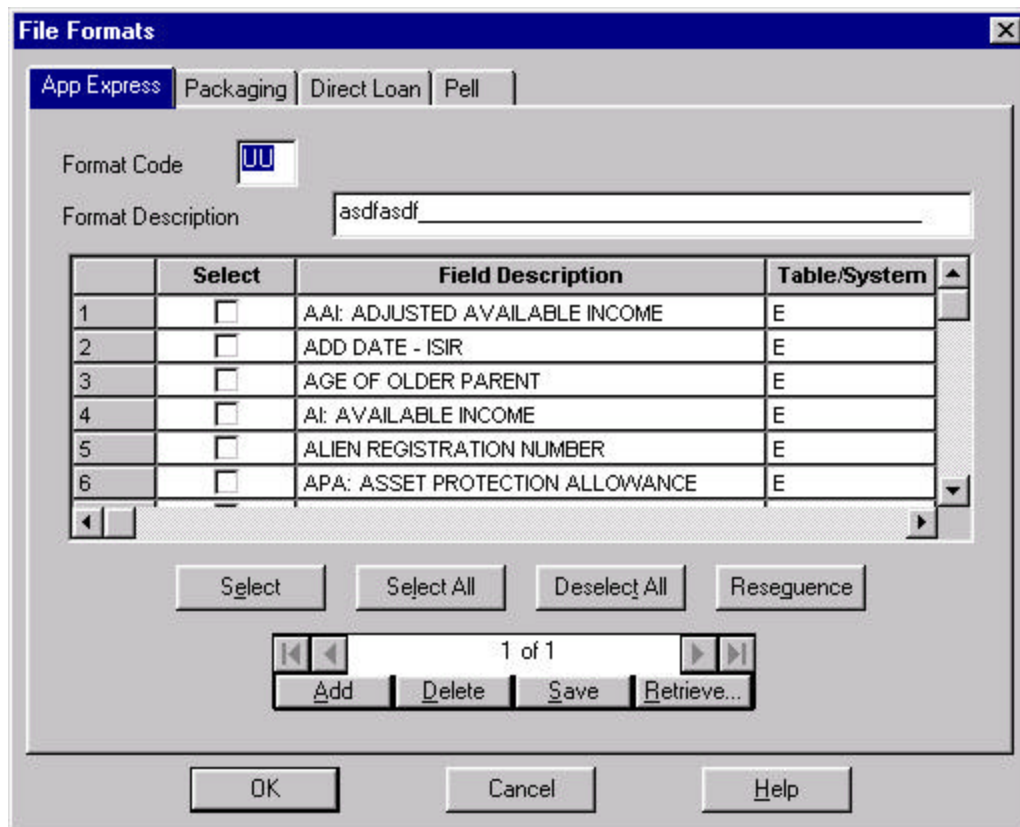
## *File Formats*

- Allows you to export partial or complete ISIR information to an external system (such as Microsoft Excel)



- Available at  
TOOLS | FILE  
FORMATS.

# How to Create a File Format



The dialog box titled "File Formats" has tabs for "App Express", "Packaging", "Direct Loan", and "Pell". The "App Express" tab is selected. It contains a "Format Code" field with a dropdown menu showing "UU". Below it is a "Format Description" text field containing "asdfasdf". A table with 4 columns: "Select", "Field Description", and "Table/System" (the first column is implicitly the row number). The table lists 6 items:

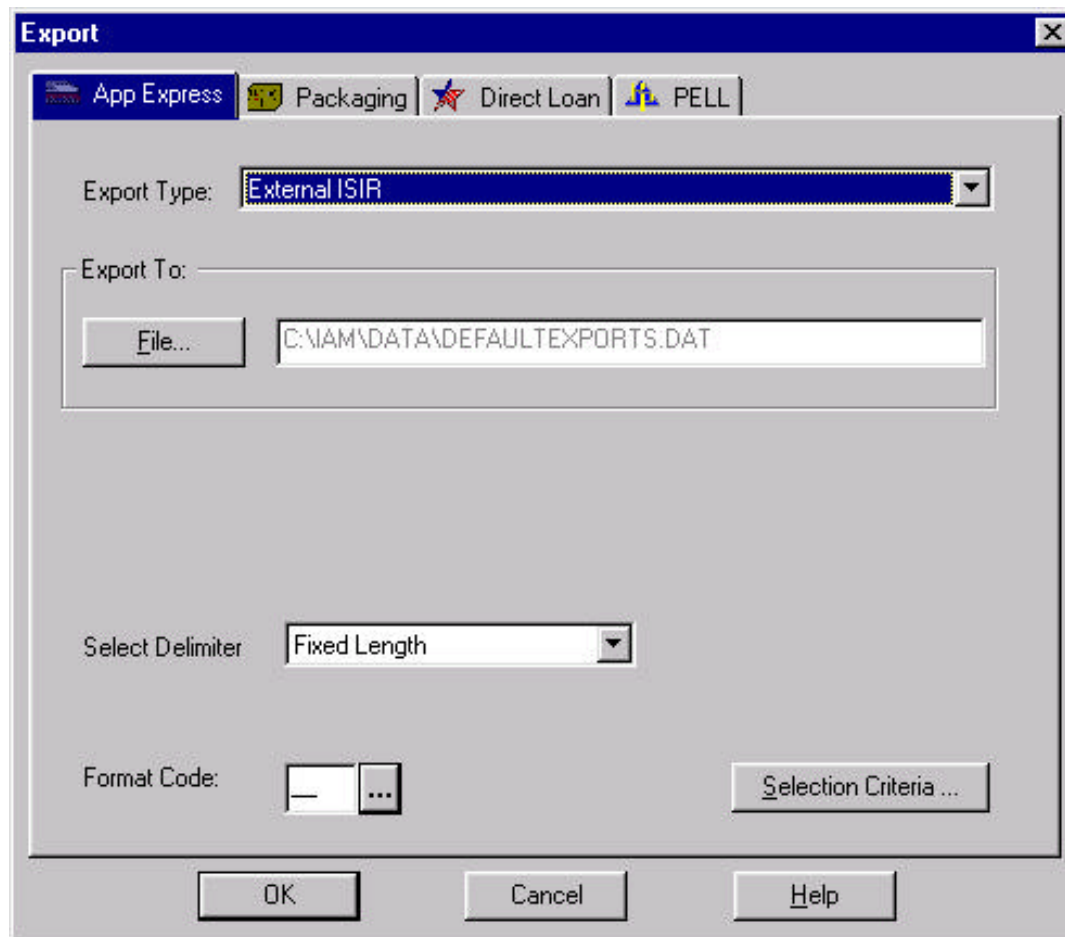
	Select	Field Description	Table/System
1	<input type="checkbox"/>	AAI: ADJUSTED AVAILABLE INCOME	E
2	<input type="checkbox"/>	ADD DATE - ISIR	E
3	<input type="checkbox"/>	AGE OF OLDER PARENT	E
4	<input type="checkbox"/>	AI: AVAILABLE INCOME	E
5	<input type="checkbox"/>	ALIEN REGISTRATION NUMBER	E
6	<input type="checkbox"/>	APA: ASSET PROTECTION ALLOWANCE	E

Below the table are buttons: "Select", "Select All", "Deselect All", and "Resequenece". Below these are navigation buttons: "Add", "Delete", "Save", and "Retrieve...". At the bottom are "OK", "Cancel", and "Help" buttons.

- 2-letter Format Code
- Description
- Check of items in SELECT column
- Save

## *Export Your Data*

- File | Export.
- External ISIR.
- Jot down file name.
- Set delimiter.
- Choose format code.
- Click OK.



The image shows a screenshot of the 'Export' dialog box from a software application. The dialog has a title bar with 'Export' and a close button. Below the title bar are four tabs: 'App Express', 'Packaging', 'Direct Loan', and 'PELL'. The 'App Express' tab is selected. Inside the dialog, there are several fields and buttons:

- Export Type:** A dropdown menu with 'External ISIR' selected.
- Export To:** A text field containing 'C:\IAM\DATA\DEFAULTEXPORTS.DAT'. To the left of this field is a 'File...' button.
- Select Delimiter:** A dropdown menu with 'Fixed Length' selected.
- Format Code:** A text field containing a hyphen '-' followed by a button with three dots '...'.
- Selection Criteria ...** A button located to the right of the Format Code field.
- Buttons:** At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Help'.



# *Evaluations & Questions*

- Please take a few moments to fill out the evaluations
- Questions
- Additional help available in the PC labs



# ***CPS/WAN Technical Support***

We appreciate your feedback and comments. We can be reached:

Phone: 1 800 330 5947

Fax: 1 785 838 2175 or  
1 319 358 4260

E-mail: [cpswan@ncs.com](mailto:cpswan@ncs.com)